

**State of Michigan**  
**Department of Licensing and Regulatory Affairs**  
**MICHIGAN PUBLIC SERVICE COMMISSION**

**MICHIGAN ENERGY ASSISTANCE PROGRAM**

**REQUEST FOR PROPOSAL**  
**LOW-INCOME ENERGY ASSISTANCE GRANT**

<b>ESTIMATED TIMELINE</b>	
Issue Date	September 20, 2013
Inquiries Due	September 30, 2013
Proposals Due	October 7, 2013
Anticipated Start Date	November 27, 2013



**SEPTEMBER 20, 2013**

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# LOW-INCOME ENERGY ASSISTANCE GRANT REQUEST FOR PROPOSAL

## PART I: GENERAL GRANT INFORMATION

### I-A Statement of Purpose

Public Act 615 of the Michigan Public Acts of 2012 (MCL 400.1231 *et seq.*) was enacted creating the Michigan Energy Assistance Act that requires the Michigan Department of Human Services (DHS) to establish and administer the Michigan Energy Assistance Program (MEAP). The Act allows DHS to use funds received from a federal energy assistance program and any funds collected or appropriated to fund the program.

Public Act 95 of the Michigan Public Acts of 2013 (MCL 460.9t) was enacted creating the Low-Income Energy Assistance Fund (LIEAF) charging DHS with expending money from the fund as provided by the Michigan Energy Assistance Act. The Act allows the Michigan Public Service Commission (MPSC) to annually approve a low-income energy assistance funding factor, not to exceed \$50,000,000 to fund the LIEAF.

On July 29, 2013, the MPSC issued an Order in Case No. U-17377 adopting a funding factor of 99 cents per meter per month for all Michigan electric utilities that have opted to participate in the funding of the LIEAF, effective for the September 2013 billing month.

The purpose of this Request for Proposal (RFP) is to obtain proposals from public or private entities or local units of government that will intervene in energy crisis situations and provide energy assistance program services that will help eligible low-income households meet home energy costs for their primary residence through payment or partial payment of bills for one or more of the following: 1) electricity; 2) natural gas; 3) propane; 4) heating oil; or 5) any other deliverable fuel used to provide heat. Energy assistance programs must include services that will enable participants to become or move toward becoming self-sufficient, including assisting participants in paying their energy bills on time, assisting participants in budgeting for and contributing to their ability to provide for energy expenses, and assisting participants in utilizing energy services to optimize on energy efficiency.

As set forth in the Michigan Energy Assistance Act (MCL 400.1231 *et seq.*):

(1) “Crisis” means one of the following: 1) an individual or recipient has received a past due notice on an energy bill for his or her household; 2) a residential fuel tank is estimated to contain not more than 25% of its heating fuel capacity; 3) a stated need for deliverable fuel or a nontraditional fuel source in which there is no meter or regular energy bill provided; or 4) a notice that the balance in a prepayment account is below a minimum amount.

(2) “Crisis season” refers to the period from November 1 through May 31 each year. Not more than 30% of the funds awarded for energy assistance programs shall be spent on home energy costs accrued outside the “crisis season.”

(3) “Eligible low-income household” means a household with an income of not more than (i) 150% of the federal poverty guidelines or (ii) an amount equal to 60% of the State median income; except that a low-income household may not be excluded from eligibility solely on the basis of household income if such income is less than 110% of the poverty level, but priority may

be given to those households with the highest home energy costs or needs in relation to household income.

(4) “Federal poverty guidelines” means the poverty guidelines published annually in the federal register by the United States Department of Health and Human Services under its authority to revise the poverty line under section 673(2) of subtitle B of title VI of the Omnibus Budget Reconciliation Act of 1981, 42 USC 9902.

As set forth in MCL 460.9t(7) an electric utility, municipally owned electric utility, or cooperative electric utility that elects to not collect a low-income energy assistance funding factor shall not shut off service to any residential customer from November 1 to April 15 for nonpayment of a delinquent account.

As set forth in MCL 460.9r(3)(d) heating season means November 1 through March 31.

Through the grant award process consideration will be given to the fact that LIEAF grant funds collected from a geographic area must be returned, to the extent possible, to that geographic area. Low-Income Home Energy Assistance Program (LIHEAP) funds do not carry the geographic area restriction described above. Refer to Attachment A for a list of the electric service providers in Michigan that have chosen to contribute to the LIEAF, and a list of the electric service providers that are not participating. Refer to Attachments B and C for Michigan electric and natural gas utility service area maps, respectively.

While the grant funding sources are the LIEAF and LIHEAP, all funds carry the federal LIHEAP reporting requirements as set forth in Section IV-B, Monitoring and Reporting Program Performance.

The approximate amount available for this Low-Income Energy Assistance (LIEA) Grant is \$90,000,000 consisting of \$50,000,000 from the LIEAF and \$40,000,000 from the LIHEAP. It is anticipated that one or more grants will be approved by the MPSC in October 2013, and the grant period is expected to begin November 27, 2013 and end August 31, 2014.

All distributions to selected applicant(s) shall come from the LIEAF and the LIHEAP in shares proportionate to the total share of LIEAF and LIHEAP funds designated to MEAP.

The grant(s) awarded from this solicitation will support actual expenditures incurred within the grant period that are supported by source documentation (further defined in Section II-G, Accounting). This RFP provides interested parties with sufficient information to enable them to prepare and submit a proposal, budget, budget narrative, and timeline. Refer to Part V: Information Required from Applicant.

## **I-B Eligibility Requirements**

To be eligible to receive a grant under this RFP, the applicant must be a public or private entity or local unit of government.

### **I-C Issuing Office and Funding Source**

This RFP is issued by the MPSC, an agency within the Department of Licensing and Regulatory Affairs (DLARA). The MPSC is the point of contact for this RFP for purposes of grant administration. The contact person at the MPSC is:

Lois Gruesbeck, Grant Administrator  
Michigan Public Service Commission  
Service Quality Division  
Energy Grants Section  
Telephone: 517-241-6167  
Email: [mpsc-grants@michigan.gov](mailto:mpsc-grants@michigan.gov)

The 2014 budget approved by the Governor, Public Act 59 of the Michigan Public Acts of 2013 appropriated \$60,000,000 to DHS to operate the MEAP.

The MEAP will be funded by \$50,000,000 collected through a low-income energy assistance funding factor approved by the MPSC; and \$10,000,000 in LIHEAP funds provided by DHS. DHS will provide additional LIHEAP funds in the amount of \$30,000,000 to support energy assistance and self-sufficiency efforts for low-income households.

DHS and DLARA entered into an Interagency Agreement charging the MPSC with the administration of a low-income energy assistance grant process on behalf of DHS in the amount of approximately \$90,000,000.

### **I-D Grant Award**

Grant award negotiations will be undertaken with the applicant(s) whose proposal shows the organization to be responsible, highly qualified, and capable of performing the project within the established timeline. It is expected that one or more grants will be awarded. The approximate amount available for these grants is \$90,000,000.

The grant(s) that may be entered into will be based on the RFP selection criteria provided in Part VI: Section Criteria and the objectives of the MPSC.

### **I-E Rejection of Proposals**

The State reserves the right to reject any and all proposals received as a result of this RFP.

### **I-F Incurring Costs**

The State of Michigan is not liable for any cost incurred by an applicant prior to signing of a Grant Agreement.

## **I-G Pre-Proposal Conference**

No pre-proposal conference will be held for this RFP. Inquiries should be submitted as outlined in Section I-H, Inquiries.

## **I-H Inquiries**

Questions that arise as a result of this RFP must be submitted no later than **5:00 PM** on **September 30, 2013**. Inquiries may be submitted electronically to the Issuing Office at [mpsc-grants@michigan.gov](mailto:mpsc-grants@michigan.gov) or made in writing to the Grant Administrator at the address listed in Section I-C, Issuing Office and Funding Source. All inquiries should reference “2014 LIEA Grant.”

Inquiries will be responded to and posted on the MPSC website at [www.michigan.gov/energygrants](http://www.michigan.gov/energygrants) under “Spotlight.”

## **I-I Changes to the RFP**

Written answers to questions that change or substantially clarify the RFP will be provided to all prospective applicants on the MPSC website at [www.michigan.gov/energygrants](http://www.michigan.gov/energygrants).

## **I-J Due Date**

To be considered for a grant award, a proposal must be received in the Issuing Office no later than **5:00 PM** on **October 7, 2013**. Proposals must reference “2014 LIEA Grant.” **Proposals must be submitted electronically to [mpsc-grants@michigan.gov](mailto:mpsc-grants@michigan.gov)**. A confirmation will be sent by the Issuing Office within 24 hours of receipt. If a confirmation is not received, applicant must contact the Grant Administrator identified in Section I-C, Issuing Office and Funding Source. Electronic submission of PDF documents cannot exceed 15 MB. **Mailed, hand delivered, and faxed proposals will not be accepted.**

## **I-K Proposals**

To be considered, applicants must submit a complete response to this RFP using the format specified in Part V: Information Required from Applicant. The proposal must be signed by an official authorized to bind the applicant to the provisions of this RFP. For this RFP, the proposal must remain valid for at least 90 days.

## **I-L Acceptance of Proposal Content**

The contents of this RFP and the proposal of the selected applicant(s) may become grant obligations if a grant award ensues. Failure of the selected applicant(s) to accept these obligations may result in cancellation of the award.

## **I-M Economy of Preparation**

Using the format provided in Part V: Information Required from Applicant, proposals should be prepared providing a straight-forward, concise description of the applicant’s ability to meet the requirements of the RFP. Emphasis should be on completeness and clarity of content.

## **I-N Prime Applicant Responsibilities**

The selected applicant(s) will be required to assume responsibility for all services offered in their proposal whether or not they possess them within their organization. Further, the State will consider the selected applicant(s) to be the sole point of contact with regard to grant matters, including payment of any and all charges resulting from the grant.

## **I-O Grant Payment Schedule**

Payment for any grant entered into as a result of this RFP will be made according to the following schedule:

An initial advance of 50% of the total grant award will be made to the selected applicant(s) after a Grant Agreement is fully executed. An advance of the remaining 50% of the total grant award will be provided upon submission of a Financial Status Report/Payment Request accompanied by documentation showing that at least 50% of the original grant advance has been expended.

Public Act 279 of 1984, MCL 17.52, states that the State shall take all steps necessary to assure that payment for goods or services is mailed within 45 days after receipt of the goods or services, a complete invoice for goods or services, or a complete contract for goods or services, whichever is later.

## **I-P News Releases**

News releases pertaining to this RFP or the service, study, or project to which it relates shall not be made without prior State approval and coordination with the Michigan Public Service Commission.

## **I-Q Disclosure of Proposal Contents**

The information in all proposals and any grant resulting from the RFP are subject to disclosure under the Michigan Freedom of Information Act, 1976 PA 442, as amended, MCL 15.231, *et seq.*

## **I-R Copyrighted Materials**

The selected applicant(s) shall agree to grant to the State a nonexclusive, irrevocable license to reproduce, translate, publish, use, and dispose of all copyrightable material developed as a result of the project.

## **PART II: GENERAL PROVISIONS**

### **II-A Project Changes**

The selected applicant(s) *must* obtain prior written approval for major project changes from the Grant Administrator.

### **II-B Record Retention**

The selected applicant(s) shall retain all financial records, supporting documents, statistical records, and all other pertinent records for a period of seven (7) years or greater as provided by law following the creation of the records or documents.

### **II-C Program Income**

To the extent that it can be determined that interest was earned on advances of funds, such interest shall be remitted to the grantor. All other program income shall either be added to the program budget and used to further eligible program objectives or deducted from the total program budget for the purpose of determining the amount of reimbursable costs. The final determination shall be made by the Grant Administrator.

### **II-D Share-in-Savings**

The grantor expects to share in any cost savings realized by the selected applicant(s). Therefore, final grantee reimbursement will be based on actual expenditures. Exceptions to this requirement must be approved in writing by the Grant Administrator.

### **II-E Order of Spending**

Unless otherwise required, the selected applicant(s) shall expend funds in the following order: (1) private or local funds, (2) federal funds, and (3) State funds. The selected applicant(s) is responsible for securing any required matching funds from sources other than the State.

### **II-F Purchase of Equipment**

The purchase of equipment not specifically listed in the budget must have prior written approval of the Grant Administrator. Equipment is defined as non-expendable personal property having a useful life of more than one year. Such equipment shall be retained by the selected applicant(s) unless otherwise specified at the time of approval.

### **II-G Accounting**

The selected applicant(s) shall adhere to the Generally Accepted Accounting Principles and shall maintain records which will allow, at a minimum, for the comparison of actual outlays with budgeted amounts. The selected applicant's overall financial management system must ensure effective control over and accountability for all funds received. Accounting records must be supported by source documentation including, but not limited to, balance sheets, general ledgers, time sheets and invoices. The expenditure of State funds shall be reported by line item and compared to the budget.

## **II-H Audit**

The selected applicant(s) agrees that the State may, upon 24-hour notice, perform an audit and/or monitoring review at the selected applicant's location(s) to determine if the selected applicant(s) is complying with the requirements of the Grant Agreement. The selected applicant agrees to cooperate with the State during the audit and/or monitoring review and produce all records and documentation that verifies compliance with the Grant Agreement requirements. The grantor may require the completion of an audit before final payment.

If selected applicant(s) is a recipient of Low-Income Energy Assistance Grant funds and receives \$100,000 or more in any 12-month period, then the selected applicant(s) is required to submit an audited financial report to the grantor within thirty (30) days after the completion of the audit; but no later than nine (9) months after the end of the grantee's fiscal year.

If the selected applicant is a governmental or non-profit organization and expends the minimum level specified in OMB Circular A-133 (\$500,000 as of June 27, 2003) or more in total federal funds in its fiscal year, then selected applicant is required to submit a Single Audit report to all agencies that provided federal funds to the entity during the fiscal year being audited.

If the selected applicant is a commercial or for profit organization which is a recipient of Workforce Investment Act Title I funds and expends more than the minimum level specified in Office of Management and Budget (OMB) Circular A-133 (\$500,000 as of June 27, 2003), then the selected applicant must have either an organization-wide audit conducted in accordance with A-133 or a program specific financial and compliance audit conducted. Section .320(a) of OMB Circular A-133 states the Single Audit report must be submitted to the Issuing Office within thirty (30) days after the completion of the audit, but no later than nine (9) months after the end of the selected applicant's fiscal year.

## **II-I Competitive Bidding**

The selected applicant(s) agrees that all procurement transactions involving the use of State funds shall be conducted in a manner that provides maximum open and free competition. When competitive selection is not feasible or practical, the selected applicant(s) agrees to obtain the written approval of the Grant Administrator before making a sole source selection. Sole source contracts should be negotiated to the extent that such negotiation is possible.

## **II-J Liability**

The State is not liable for any costs incurred by the selected applicant(s) before the start date or after the end date of the Grant Agreement. Liability of the State is limited to the terms and conditions of the Grant Agreement and the grant amount.

## **II-K Intellectual Property**

Unless otherwise required by law, all intellectual property developed using funds from the Grant Agreement, including copyright, patent, trademark and trade secret, shall belong to the selected applicant(s).

## **II-L Safety**

The selected applicant(s), all contractors, and subcontractors are responsible for insuring that all precautions are exercised at all times for the protection of persons and property. Safety provisions of all applicable laws and building and construction codes shall be observed. The selected applicant(s), contractors, and every subcontractor are responsible for compliance with all federal, State and local laws and regulations in any manner affecting the work or performance of the Grant Agreement and shall at all times carefully observe and comply with all rules, ordinances, and regulations. The selected applicant(s), all contractors and subcontractors shall secure all necessary certificates and permits from municipal or other public authorities as may be required in connection with the performance of the Grant Agreement.

## **II-M Indemnification**

### **(1) General Indemnification**

To the extent permitted by law, the selected applicant(s) shall indemnify, defend and hold harmless the State from liability, including all claims and losses, and all related costs and expenses (including reasonable attorneys' fees and costs of investigation, litigation, settlement, judgments, interest and penalties), accruing or resulting to any person, firm or corporation that may be injured or damaged by the selected applicant(s) in the performance of the Grant Agreement and that are attributable to the negligence or tortious acts of the selected applicant(s) or any of its subcontractors, or by anyone else for whose acts any of them may be liable.

### **(2) Employee Indemnification**

In any and all claims against the State, its departments, divisions, agencies, sections, commissions, officers, employees and agents, by any employee of the selected applicant(s) or any of its subcontractors, the indemnification obligation under the Grant Agreement shall not be limited in any way by the amount or type of damages, compensation or benefits payable by or for the selected applicant(s) or any of its subcontractors under worker's disability compensation acts, disability benefit acts or other employee benefit acts. This indemnification clause is intended to be comprehensive. Any overlap in provisions, or the fact that greater specificity is provided as to some categories of risk, is not intended to limit the scope of indemnification under any other provisions.

### **(3) Patent/Copyright Infringement Indemnification**

To the extent permitted by law, the selected applicant(s) shall indemnify, defend and hold harmless the State from and against all losses, liabilities, damages (including taxes), and all related costs and expenses (including reasonable attorneys' fees and costs of investigation, litigation, settlement, judgments, interest and penalties) incurred in connection with any action or proceeding threatened or brought against the State to the extent that such action or proceeding is based on a claim that any piece of equipment, software, commodity or service developed or supplied by the selected applicant(s) or its subcontractors, or the operation of such equipment, software, commodity or service, or the use or reproduction of any documentation provided with such equipment, software, commodity or service infringes any United States patent, copyright, trademark or trade secret of any person or entity, which is enforceable under the laws of the United States.

The selected applicant's duty to indemnify pursuant to this section continues in full force and effect, notwithstanding the expiration or early cancellation of the Grant Agreement, with respect to any claims based on facts or conditions that occurred before expiration or cancellation.

## **II-N Cancellation**

The State may terminate the Grant Agreement without further liability or penalty to the State, its departments, divisions, agencies, offices, commissions, officers, agents and employees for any of the following reasons:

### **(1) Termination for Cause**

In the event that selected applicant(s) breaches any of its material duties or obligations under the Grant Agreement or poses a serious and imminent threat to the health and safety of any person, or the imminent loss, damage or destruction of any real or tangible personal property, the State may terminate the Grant Agreement immediately in whole or in part, for cause, as of the date specified in the notice of termination. In the event that the Grant Agreement is terminated for cause, in addition to any legal remedies otherwise available to the State by law or equity, selected applicant(s) shall be responsible for all costs incurred by the State in terminating the Grant Agreement, including but not limited to, State administrative costs, reasonable attorney's fees and court costs, and any reasonable additional costs the State may incur.

### **(2) Termination for Convenience**

The State may terminate the Grant Agreement for its convenience, in whole or part, if the State determines that such a termination is in the State's best interest. Reasons for such termination shall be left to the sole discretion of the State and may include, but not necessarily be limited to (a) the State no longer needs the services or products specified in the Grant Agreement, (b) relocation of office, program changes, changes in laws, rules, or regulations make implementation of the services no longer practical or feasible. The State may terminate the Grant Agreement for its convenience, in whole or in part, by giving selected applicant(s) written notice at least thirty (30) days prior to the date of termination. If the State chooses to terminate this Grant Agreement in part, the budget shall be equitably adjusted to reflect those reductions.

### **(3) Non-Appropriation**

Selected applicant(s) acknowledges that continuation of the Grant Agreement is subject to appropriation or availability of funds for the Grant Agreement. If funds to enable the State to effect continued payment under the Grant Agreement are not appropriated or otherwise made available (including the federal government suspending or halting the program or issuing directives preventing the State from continuing the program), the State shall have the right to terminate this Grant Agreement, in whole or in part, at the end of the last period for which funds have been appropriated or otherwise made available by giving written notice of termination to selected applicant(s). The State shall give selected applicant(s) at least thirty (30) days advance written notice of termination for non-appropriation or unavailability (or such time as is available if the State receives notice of the final decision less than thirty (30) days before the funding cutoff). In the event of a termination under this section, the selected applicant(s) shall, unless otherwise directed by the State in writing, immediately take all reasonable steps to terminate its operations and to avoid and/or minimize further expenditures under the Grant Agreement.

(4) Criminal Conviction

The State may terminate the Grant Agreement immediately and without further liability or penalty in the event selected applicant(s), an officer of selected applicant(s), or an owner of a 25% or greater share of selected applicant(s) is convicted of a criminal offense incident to the application for, or performance of, a State, public or private contract or subcontract or grant; convicted of a criminal offense, including any of the following: embezzlement, theft, forgery, bribery, falsification or destruction of records, receiving stolen property, attempting to influence a public employee to breach the ethical conduct standards for State of Michigan employees; convicted under State or federal antitrust statutes; or convicted of any other criminal offense which in the sole discretion of the State, reflects upon selected applicant's business integrity.

(5) Approvals Rescinded

The State may terminate the Grant Agreement without further liability or penalty in the event any final administrative or judicial decision or adjudication disapproves a previously approved request for purchase of personal services pursuant to Constitution 1963, Article 11, § 5, and Civil Service Rule 7-1. Termination may be in whole or in part and may be immediate as of the date of the written notice to selected applicant(s) or may be effective as of the date stated in such written notice.

**II-O No State Employees or Legislators**

No member of the Legislature or Judiciary of the State of Michigan or any individual employed by the State shall be permitted to share in the Grant Agreement, or any benefit that arises from the Grant Agreement.

**II-P Non-Discrimination**

In the performance of the Grant Agreement, selected applicant(s) agrees not to discriminate against any employee or applicant for employment, with respect to his or her hire, tenure, terms, conditions or privileges of employment, or any matter directly or indirectly related to employment, because of race, color, religion, national origin, ancestry, age, sex, height, weight, marital status, physical or mental disability. Selected applicant(s) further agrees that every subcontract entered into for the performance of the Grant Agreement will contain a provision requiring non-discrimination in employment, as here specified, binding upon each subcontractor. This covenant is required pursuant to the Elliott Larsen Civil Rights Act, 1976 PA 453, MCL 37.2101, *et seq.* and the Persons with Disabilities Civil Rights Act, 1976 PA 200, MCL 37.1101, *et seq.*, and any breach of this provision may be regarded as a material breach of the Grant Agreement.

**II-Q Unfair Labor Practices**

Pursuant to 1980 PA 278, MCL 423.231, *et seq.*, the State shall not award a grant or subcontract to an employer whose name appears in the current register of employers failing to correct an unfair labor practice compiled pursuant to section 2 of the Act. This information is compiled by the United States National Labor Relations Board. A selected applicant, in relation to the Grant Agreement, shall not enter into a contract with a subcontractor, manufacturer, or supplier whose name appears in this register. Pursuant to section 4 of 1980 PA 278,

MCL 423.324, the State may void any Grant Agreement if, subsequent to award of the Grant Agreement, the name of grantor as an employer or the name of the subcontractor, manufacturer or supplier of grantor appears in the register.

## **II-R Certification Regarding Debarment**

The selected applicant(s) certifies, by signature to the Grant Agreement, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in the Grant Agreement by any federal or State department or agency. If the selected applicant(s) is unable to certify to any portion of this statement, the selected applicant(s) shall attach an explanation to the Grant Agreement.

## **II-S Illegal Influence**

(1) The selected applicant(s) certifies, to the best of his or her knowledge and belief that:

(a) No federal appropriated funds have been paid nor will be paid, by or on behalf of the selected applicant(s), to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan or cooperative agreement.

(b) If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with this grant, the selected applicant(s) shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.

(c) The selected applicant(s) shall require that the language of this certification be included in the award documents for all grant or subcontracts and that all subrecipients shall certify and disclose accordingly.

The State has relied upon this certification as a material representation. Submission of this certification is a prerequisite for entering into this Grant Agreement imposed by 31 USC § 1352. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

(2) The selected applicant(s) certifies, to the best of his or her knowledge and belief that no State funds have been paid nor will be paid, by or on behalf of the selected applicant(s), to any person for influencing or attempting to influence an officer or employee of any State agency, a member of the Legislature, or an employee of a member of the Legislature in connection with the awarding of any State contract, the making of any State grant, the making of any State loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any State contract, grant, loan or cooperative agreement.

## **II-T Governing Law**

The Grant Agreement shall in all respects be governed by, and construed in accordance with, the substantive laws of the State of Michigan without regard to any Michigan choice of law rules that would apply the substantive law of any other jurisdiction to the extent not inconsistent with, or pre-empted by federal law.

## **II-U Compliance with Laws**

Selected applicant(s) shall comply with all applicable State, federal, and local laws and ordinances (“Applicable Laws”) in performing this Grant Agreement.

## **II-V Jurisdiction**

Any dispute arising from the Grant Agreement shall be resolved in the State of Michigan. With respect to any claim between the parties, selected applicant(s) consents to venue in Ingham County, Michigan, and irrevocably waives any objections it may have to such jurisdiction on the grounds of lack of personal jurisdiction of such court or the laying of venue of such court or on the basis of forum non conveniens or otherwise. Contractor agrees to appoint agents in the State of Michigan to receive service of process.

## **II-W Assignment**

Selected applicant(s) shall not have the right to assign the Grant Agreement, or to assign or delegate any of its duties or obligations under the Grant Agreement, to any other party (whether by operation of law or otherwise), without the prior written consent of the grantor. Any purported assignment in violation of this section shall be null and void.

## **II-X Entire Grant Agreement**

The Grant Agreement, including any attachments, will constitute the entire Grant Agreement between the parties with respect to the grant and supersedes all prior Grant Agreements, whether written or oral, with respect to such subject matter.

## **II-Y Independent Contractor Relationship**

The relationship between the State and selected applicant(s) is that of client and independent contractor. No agent, employee, or servant of selected applicant(s) or any of its subcontractors shall be or shall be deemed to be an employee, agent or servant of the State for any reason. Selected applicant(s) will be solely and entirely responsible for its acts and the acts of its agents, employees, servants and subcontractors during the performance of the Grant Agreement.

**II-Z Conflicts**

In the event of a conflict between the terms of the Grant Agreement and any federal or State laws or regulations, the federal or State laws or regulations will supersede any contrary term contained in the Grant Agreement.

## PART III: WORK STATEMENT

### III-A Purpose

The purpose of this Request for Proposal (RFP) is to obtain proposals from public or private entities or local units of government that will intervene in energy crisis situations and provide energy assistance program services that will help eligible low-income households meet home energy costs for their primary residence through payment or partial payment of bills for one or more of the following: 1) electricity; 2) natural gas; 3) propane; 4) heating oil; or 5) any other deliverable fuel used to provide heat. Energy assistance programs must include services that will enable participants to become or move toward becoming self-sufficient, including assisting participants in paying their energy bills on time, assisting participants in budgeting for and contributing to their ability to provide for energy expenses, and assisting participants in utilizing energy services to optimize on energy efficiency.

As set forth in the Michigan Energy Assistance Act (MCL 400.1231 *et seq.*):

(1) “Crisis” means one of the following: 1) an individual or recipient has received a past due notice on an energy bill for his or her household; 2) a residential fuel tank is estimated to contain not more than 25% of its heating fuel capacity; 3) a stated need for deliverable fuel or a nontraditional fuel source in which there is no meter or regular energy bill provided; or 4) a notice that the balance in a prepayment account is below a minimum amount.

(2) “Crisis season” refers to the period from November 1 through May 31 each year. Not more than 30% of the funds awarded for energy assistance programs shall be spent on home energy costs accrued outside the “crisis season.”

(3) “Eligible low-income household” means a household with an income of not more than (i) 150% of the federal poverty guidelines or (ii) an amount equal to 60% of the State median income; except that a low-income household may not be excluded from eligibility solely on the basis of household income if such income is less than 110% of the poverty level, but priority may be given to those households with the highest home energy costs or needs in relation to household income.

(4) “Federal poverty guidelines” means the poverty guidelines published annually in the federal register by the United States Department of Health and Human Services under its authority to revise the poverty line under section 673(2) of subtitle B of title VI of the Omnibus Budget Reconciliation Act of 1981, 42 USC 9902.

As set forth in MCL 460.9t(7) an electric utility, municipally owned electric utility, or cooperative electric utility that elects to not collect a low-income energy assistance funding factor shall not shut off service to any residential customer from November 1 to April 15 for nonpayment of a delinquent account.

As set forth in MCL 460.9r(3)(d) heating season means November 1 through March 31.

Preference in awarding the grants may be given to public or private entities or local units of government with a proven record in distributing energy assistance to low-income residents, an existing energy assistance program, an administrative structure that can handle additional

distribution activities, and possess the ability to coordinate the provision of energy assistance with other service providers.

### **III-B Problem Statement**

Michigan is experiencing a decrease in energy assistance funding in conjunction with a rise in requests for assistance by citizens in need of resources to supplement or reduce their energy costs. Almost universally, assistance agencies report that the demand for energy assistance far exceeds available funding, and utilities in Michigan report a steady increase in the number of low-income households among their customers and that participation in income-qualified plans has increased greatly.

The current distribution system is complex and fragmented with multiple agencies offering energy assistance with varying eligibility processes and benefits. Energy assistance is often provided too late to prevent chronic crisis and promote self-sufficiency. The current model for delivery does not incorporate customer accountability or provide incentives for positive actions by the customer for more responsible energy usage. Outcomes are not measured using uniform methodology.

The implementation of innovative, cost-efficient energy assistance programs that provide extended case management, assistance with energy payments, financial and energy education, and employment assistance can help low-income households learn to achieve and maintain an independent self-sufficient lifestyle that allows them to provide the basic needs for their families.

### **III-C Objectives**

(1) Provide energy assistance program services that will help eligible low-income households meet home energy costs for their primary residence through payment or partial payment of bills for electricity, propane, heating oil, or any other deliverable fuel used to provide heat.

(2) Provide energy assistance programs that include services that will enable participants to become or move toward becoming self-sufficient, including assisting participants in paying their energy bills on time, assisting participants in budgeting for and contributing to their ability to provide for energy expenses, and assisting participants in utilizing energy services to optimize on energy efficiency.

(3) Substantially reduce shut-offs by redefining crisis and shifting the emphasis of energy assistance towards prevention and accountability and away from emergency crisis relief.

(4) Promote the discovery of innovative, cost-efficient, evidence-based methods for providing energy assistance to low-income households in Michigan.

(5) Result in a convenient, customer-friendly system for distribution of energy assistance.

(6) It is anticipated that eligible low-income households will work with a single energy assistance provider throughout the entire heating season. Any payment made on behalf of an energy customer must resolve the crisis/emergency for at least 30 days.

### **III-D Tasks**

(1) Provide specific services that will help eligible low-income households meet home energy costs for their primary residence through payment or partial payment of bills for electricity, propane, heating oil, or any other deliverable fuel used to provide heat. Any payment made on behalf of an energy customer must resolve the crisis/emergency for at least 30 days. It is anticipated that eligible low-income households will work with a single energy assistance provider throughout the entire heating season.

(2) Provide energy assistance program services that will enable participants to become or move toward becoming self-sufficient, including assisting participants in paying their energy bills on time, assisting participants in budgeting for and contributing to their ability to provide for energy expenses, and assisting participants in utilizing energy services to optimize on energy efficiency through the organization's existing administrative framework.

(3) Determine household eligibility and issue energy assistance services to eligible applicants in accordance with applicable state and federal law. Refer to the client/household eligibility verification requirements provided in Attachment D. Low-income households are not required to seek energy assistance services from DHS prior to seeking energy assistance from selected applicant(s).

(4) Conduct outreach activities and provide assistance to low income households in meeting their home energy costs, particularly those with the lowest incomes that pay a high proportion of household income for home energy.

(5) Conduct outreach activities designed to ensure eligible households, especially households with elderly individuals or disabled individuals, or both, and households with high home energy burdens, are made aware of the assistance available under this program and any other energy related assistance programs.

(6) Observe a 10 day standard of promptness in the process of eligibility determination and benefit issuance for complete and timely filed applications.

(7) Establish a procedure by which applicants wishing to contest an eligibility decision or the timeliness of such a decision may be referred to the DHS for a re-evaluation of eligibility.

(8) Maintain data and metrics as specified in Section IV-B, Monitoring and Reporting Program Performance.

(9) Maintain and share client/household information with the MPSC to ensure that the same households do not receive (i) both energy assistance under MEAP and energy crisis relief from DHS pursuant to the State Emergency Relief (SER) program, or (ii) direct energy assistance under MEAP from more than one selected applicant. An Excel spreadsheet with the required information will be provided to the selected applicant(s). Refer to the client/household spreadsheet example provided in Attachment E. All client information will be shared with DHS.

(10) Ensure that not more than 30% of the funds awarded are spent on home energy costs accrued outside the crisis season.

(11) Coordinate availability of this low-income energy assistance program with other program services currently provided by the selected applicant(s).

(12) Coordinate the proposed project with other agencies that provide energy assistance, weatherization, and education focused on reducing energy consumption.

(13) Coordinate energy assistance payments with utility providers, cooperatives, distributors of deliverable fuels, and other energy assistance providers to more efficiently serve the needs of low-income households.

(14) Establish and implement quality control measures to ensure funds are used for the intended purpose.

(15) Objectively evaluate the success of the program.

## **PART IV: PROJECT CONTROL AND REPORTS**

### **IV-A Project Control**

The selected applicant(s) will carry out the project under the review of the Grant Administrator. The Michigan Department of Licensing and Regulatory Affairs Grant Administrator shall have final authority over the Grant Agreement.

Along with continuous liaison with the selected applicant(s), the Grant Administrator will meet as needed with the selected applicant(s)'s contact person for the purpose of reviewing progress and providing necessary guidance to the selected applicant(s) in solving problems that arise.

Prior to executing any changes to the scope of the project and/or budget, the selected applicant(s) must inform the Grant Administrator in writing outlining the proposed changes. Changes to the Grant Agreement, including the budget, can only be made during the term of the grant.

### **IV-B Monitoring and Reporting Program Performance**

The selected applicant(s) will be required to assume responsibility for monitoring and reporting. The selected applicant(s) shall monitor performance to assure that time schedules are met and projected work by time period is accomplished. If a required report's due date falls on a weekend or holiday, the report may be delivered the following business day.

<b>Reporting Schedule</b>		
<b>Report Due Date</b>	<b>Report Type</b>	<b>Period Covered</b>
January 30, 2014	Financial Status Report Households Served Data and Documentation	November 27 – December 31, 2013
February 28, 2014	Financial Status Report Households Served Data and Documentation	January 1 – January 31, 2014
March 28, 2014	Interim Project Status Report	November 27, 2013 – February 28, 2014
March 28, 2014	Financial Status Report Households Served Data and Documentation	February 1 – February 28, 2014
April 30, 2014	Financial Status Report Households Served Data and Documentation	March 1 – March 31, 2014
May 30, 2014	Financial Status Report Households Served Data and Documentation	April 1 – April 30, 2014
June 30, 2014	Interim Project Status Report	March 1 – May 31, 2014
June 30, 2014	Financial Status Report Households Served Data and Documentation	May 1 – May 31, 2014
July 30, 2014	Financial Status Report Households Served Data and Documentation	June 1 – June 30, 2014
August 29, 2014	Financial Status Report Households Served Data and Documentation	July 1 – July 31, 2014
September 15, 2014	Households Served Data and Documentation	August 1 – August 31, 2014
September 15, 2014	Final Project Report	November 27, 2013 – August 31, 2014
September 15, 2014	Final Financial Status Report	August 1 – August 31, 2014

(1) **Monthly Financial Status Reports.** The selected applicant(s) shall submit a signed and dated FSR to the Grant Administrator indicating the amount of funds expended in each line item category of the budget. Monthly FSRs must include source documentation that supports all reported expenditures including, but not limited to, general ledgers, time sheets, payroll registers, invoices, check copies and bank statements, or cancelled checks. Expenses will be verified based on actual expenditures incurred within the grant period that are supported by source documentation, not budgeted amounts. Monthly FSRs will be completed on Form C-108, which will be provided to the selected applicant(s) by the Grant Administrator. Refer to the Form C-108 example provided in Attachment F.

(2) **Monthly Households Served Data and Documentation.** The selected applicant(s) shall submit the following:

- (a) A table (example below) that provides the number of “unduplicated” households served each month. Unduplicated household means each household served should be counted only once during the term of the grant, i.e., if a household is served in January and included in the January unduplicated households served numbers, it will not be counted again during the grant term.

Unduplicated Households Served			
	TANF	Non-TANF	Total
January 30 - (November 27 – Dec. 31, 2013)			
February 28 - (Jan. 1 – Jan. 31, 2014)			
March 28 – (Feb. 1 – Feb. 28, 2014)			
April 30 – (March 1 – March 31, 2014)			
May 30 – (April 1 – April 30, 2014)			
June 30 – (May 1 – May 31, 2014)			
July 30 – (June 1 – June 30, 2014)			
August 29 – (July 1 – July 31, 2014)			
September 15 – (Aug. 1 – Aug. 31, 2014)			

- (b) A list of all clients/households served during the reporting period. The list will include every client/household energy assistance payment made during the reporting period. Client/household lists will be submitted by selected applicant(s) in an Excel spreadsheet that will be provided to selected applicant(s) by the Grant Administrator. Refer to the client/household spreadsheet example provided in Attachment E. Client/household lists will be shared with DHS.
- (c) Upon receipt of the client/household list grant staff will review and perform an attribute-sampling, and request that the selected applicant provide client/household eligibility verification documentation collected during the reporting period.

(3) **Interim Project Status Reports.** The selected applicant(s) shall submit Interim Project Status Reports to the Grant Administrator no later than March 28, 2014 and June 30, 2014. The reports should include the following information at a minimum:

- (a) **Project Identification**  
Name of selected applicant, grant number, and dates of current reporting period.
- (b) **Project Milestones**  
Percent (%) completion of the project objectives based on number of households served, and amount of energy assistance funding spent.
- (c) **Project Progress**  
Brief outline of the work accomplished during the reporting period and the work to be completed during the subsequent reporting period(s).
- (d) **Household Metrics**
  - (i) Total number of energy assistance payments.
  - (ii) Number of unduplicated households receiving energy assistance.
  - (iii) Number of unduplicated, TANF eligible households receiving energy assistance and amount of energy assistance provided.
  - (iv) Number of unduplicated, non-TANF eligible households receiving energy assistance and amount of energy assistance provided.
  - (v) Income levels of unduplicated households receiving energy assistance, and the amount of energy assistance provided.

Poverty Level	Number of Unduplicated Households Receiving Energy Assistance	Average \$ Amount Energy Assistance Provided
0 - 25%		
26 - 50%		
51 - 75%		
76 - 100%		
101 - 125%		
126 - 150%		

- (vi) Number of households that were denied energy assistance, and income levels of those households.

Poverty Level	Number of Households Denied Energy Assistance
0 - 25%	
26 - 50%	
51 - 75%	
76 - 100%	
101 - 125%	
126 - 150%	
150% - +	

- (vii) Number of households receiving energy assistance that contain at least one member age 60 or older.

- (viii) Number of households receiving energy assistance that contain at least one member age two or younger.
- (ix) Number of households receiving energy assistance that contain at least one member age three, four or five.
- (x) Number households receiving energy assistance that contain at least one handicapped member.
- (xi) Energy assistance payments by type (e.g. electric, natural gas, and deliverable fuel) and total amount of payments.

Energy Type	Number of Households Served	Total \$ Amount Energy Assistance Payments
Electric		
Natural Gas		
Combined (Elec. & Nat. Gas)		
Propane		
Heating Fuel		
Other		

- (xii) Total dollar amount of energy assistance payments made to energy providers within the selected applicant’s geographic service area of the participating electric service providers.

Energy Provider	Number of Households Served	Total \$ Amount Energy Assistance Payments
<b>Total</b>		

- (xiii) Total dollar amount of energy assistance payments made to energy providers within the selected applicant’s geographic service area of the non-participating electric service providers.

Energy Providers	Number of Households Served	Total \$ Amount Energy Assistance Payments
<b>Total</b>		

- (xiv) Number of counties served and number of households served by county.

County	Households Served		County	Households Served
Alcona			Lake	
Alger			Lapeer	
Allegan			Leelanau	
Alpena			Lenawee	
Antrim			Livingston	
Arenac			Luce	
Baraga			Mackinac	
Barry			Macomb	
Bay			Manistee	
Benzie			Marquette	
Berrien			Mason	
Branch			Mecosta	
Calhoun			Menominee	
Cass			Midland	
Charlevoix			Missaukee	
Cheboygan			Monroe	
Chippewa			Montcalm	
Clare			Montmorency	
Clinton			Muskegon	
Crawford			Newaygo	
Delta			Oakland	
Dickinson			Oceana	
Eaton			Ogemaw	
Emmet			Ontonagon	
Genesee			Osceola	
Gladwin			Oscoda	
Gogebic			Otsego	
Grand Traverse			Ottawa	
Gratiot			Presque Isle	
Hillsdale			Roscommon	
Houghton			Saginaw	
Huron			Sanilac	
Ingham			Schoolcraft	
Ionia			Shiawassee	
Iosco			St. Clair	
Iron			St. Joseph	
Isabella			Tuscola	
Jackson			Van Buren	
Kalamazoo			Washtenaw	
Kalkaska			Wayne	
Kent			Wexford	
Keweenaw				

(e) **Noteworthy Accomplishments**

Identify and describe any milestones reached or noteworthy accomplishments completed during the period.

- (f) **Delays**  
Brief description of problems or delays, real or anticipated, which should be brought to the attention of the Grant Administrator.
- (g) **Project Deviations**  
Statement concerning any significant deviation from the previously agreed-upon work plan developed in Part V: Information Required from Applicant.
- (h) **Attachments and Other Materials**  
Provide project materials developed and implemented during the reporting period (e.g. newspaper articles, newspaper advertisements, forms, brochures, announcements, studies, reports, analyses, audits, etc.).

(4) **Final Project Report.** The selected applicant(s) shall submit a draft of the final project report by September 15, 2014 for the period November 27, 2013 through August 31, 2014. After the Grant Administrator has determined the completeness and factual accuracy of the report, the selected applicant(s) shall submit a final copy of the report to the Grant Administrator. The final project report shall include the following information at a minimum:

- (a) **Project Identification**  
Name of selected applicant, grant number, and dates of current reporting period.
- (b) **Project Milestones**  
Percent (%) completion of the project objectives based on number of households served, and amount of direct assistance funding spent.
- (c) **Project Implementation**  
Outline of the work accomplished during the grant term.
- (d) **Program Metrics**
  - (i) Explain how the program has reduced the energy consumption of participating low-income households; include success metrics.
  - (ii) Explain how the program has reduced the number of shutoffs; include success metrics.
  - (iii) Explain how the program has reduced the size of the energy subsidy per household; include success metrics.
  - (iv) Explain how the program has assisted participating low-income households pay utility bills on time; include success metrics.
- (e) **Household Metrics**
  - (i) Total number of energy assistance payments.
  - (ii) Number of unduplicated households receiving energy assistance.

- (iii) Number of unduplicated, TANF eligible households receiving energy assistance and amount of energy assistance provided.
- (iv) Number of unduplicated, non-TANF eligible households receiving energy assistance and amount of energy assistance provided.
- (v) Income levels of unduplicated households receiving energy assistance, and the amount of energy assistance provided.

<b>Poverty Level</b>	<b>Number of Unduplicated Households Receiving Energy Assistance</b>	<b>Average \$ Amount Energy Assistance Provided</b>
0 - 25%		
26 - 50%		
51 - 75%		
76 - 100%		
101 -125%		
126 - 150%		

- (vi) Number of households that were denied energy assistance, and income levels of those households.

<b>Poverty Level</b>	<b>Number of Households Denied Energy Assistance</b>
0 - 25%	
26 - 50%	
51 - 75%	
76 - 100%	
101 - 125%	
126 -150%	
150% - +	

- (vii) Number of households receiving energy assistance that contain at least one member age 60 or older.
- (viii) Number of households receiving energy assistance that contain at least one member age two or younger.
- (ix) Number of households receiving energy assistance that contain at least one member age three, four or five.
- (x) Number households receiving energy assistance that contain at least one handicapped member.
- (xi) Energy assistance payments by type (e.g. electric, natural gas, and deliverable fuel) and average payment for each.

Energy Type	Number of Energy Assist. Payments	Average Payment Per Assist
Electric		
Natural Gas		
Combined (Elec. & Nat. Gas)		
Propane		
Heating Fuel		
Other		

- (xii) Total dollar amount of energy assistance payments made to energy providers within the selected applicant's geographic service area of the participating electric service providers.

Energy Providers	Number of Households Served	Total \$ Amount Energy Assistance Payments
<b>Total</b>		

- (xiii) Total dollar amount of energy assistance payments made to energy providers within the selected applicant's geographic service area of the non-participating electric service providers.

Energy Providers	Number of Households Served	Total \$ Amount Energy Assistance Payments
<b>Total</b>		

- (xiv) Number of counties served and number of households served by county.

County	Households Served	County	Households Served
Alcona		Lake	
Alger		Lapeer	
Allegan		Leelanau	
Alpena		Lenawee	
Antrim		Livingston	
Arenac		Luce	
Baraga		Mackinac	
Barry		Macomb	
Bay		Manistee	
Benzie		Marquette	
Berrien		Mason	
Branch		Mecosta	
Calhoun		Menominee	
Cass		Midland	

Charlevoix		Missaukee	
Cheboygan		Monroe	
Chippewa		Montcalm	
Clare		Montmorency	
Clinton		Muskegon	
Crawford		Newaygo	
Delta		Oakland	
Dickinson		Oceana	
Eaton		Ogemaw	
Emmet		Ontonagon	
Genesee		Osceola	
Gladwin		Oscoda	
Gogebic		Otsego	
Grand Traverse		Ottawa	
Gratiot		Presque Isle	
Hillsdale		Roscommon	
Houghton		Saginaw	
Huron		Sanilac	
Ingham		Schoolcraft	
Ionia		Shiawassee	
Iosco		St. Clair	
Iron		St. Joseph	
Isabella		Tuscola	
Jackson		Van Buren	
Kalamazoo		Washtenaw	
Kalkaska		Wayne	
Kent		Wexford	
Keweenaw			

- (f) **Noteworthy Accomplishments**  
Accomplishments and problems experienced while carrying out project activities.
- (g) **Coordinated Efforts**  
Coordinated efforts with other organizations to complete the project.
- (h) **Project Impacts**  
Impacts, anticipated and unanticipated, experienced as a result of project implementation.
- (i) **Next Steps**  
Experience in applying the project products and anticipated “next steps.”
- (j) **Financial Summary**  
Summary of financial expenditures of grant funds; include the basis or reason for any discrepancies.

(k) **Evaluation**

Evaluate the success of the program. The program should be evaluated against the Grantee's work plan and objectives. Grantee should provide an honest and objective assessment of the successes and failures of the project. The evaluation should have both quantitative and qualitative components.

(l) **Attachments and Other Materials**

Provide project materials developed and implemented that were not provided in project status reports (e.g. newspaper articles, newspaper advertisements, forms, brochures, announcements, studies, reports, analyses, audits, etc.).

(5) **Final Financial Status Report (FSR).** The selected applicant(s) shall submit a signed and dated final FSR to the Grant Administrator indicating the amount of funds expended in each line item category of the budget by September 15, 2014 for the period August 1, 2014 through August 31, 2014. The Final FSR must include source documentation that supports all reported expenditures including, but not limited to, general ledgers, time sheets, payroll registers, invoices, check copies and bank statements, or cancelled checks. Expenses will be verified based on actual expenditures incurred within the grant period that are supported by source documentation, not budgeted amounts. The Final FSR will be completed on Form C-108.

## **PART V: INFORMATION REQUIRED FROM APPLICANT**

Grant proposals must be typed in 12 point, Times New Roman font with no more than 40 numbered, double-spaced pages. The page count includes any cover page and/or attachments. Electronically submitted proposals must have a scanned signature or e-signature and cannot exceed 15 MB.

Applicant must provide responses to each section below. Please follow the format identified by stating the section number and title followed by the response. Be as descriptive as possible and answer each question in its entirety; some questions have multiple components. Questions that do not apply should be answered "NA."

### **V-A Identification of Organization**

State the full name and address of the organization, the organization's federal identification number, and the organization's telephone and fax numbers.

### **V-B Authorized Negotiator**

State the name of one (1) contact person and his/her telephone number, fax number, and electronic mail address. The contact person must be authorized to be the negotiator for the proposed Grant Agreement with the State.

### **V-C Method for Addressing the Problem**

State in succinct terms the applicant's proposed method for addressing the problem presented in Section III-B, Problem Statement. Describe any significant obstacles the applicant has had meeting the needs of low-income households while providing energy assistance.

### **V-D Management Summary**

(1) Describe management procedures that will be used by the organization to complete the proposed project.

(2) Explain how staff will be trained to handle additional distribution activity and how staff will be monitored.

(3) Describe the organization's quality control measures.

(4) Describe the organization's internal control over accounting, identify the type of accounting system/software the organization will use to account for grant funds, and indicate whether internal and external audits of the organization's operations are performed on an annual basis.

(5) Selected applicants must provide fiscal control and fund accounting procedures that will assure that grant funds will be accounted for and properly dispersed in a way that will allow the Issuing Office to clearly review and verify all grant related expenditures. Describe how the organization will account for grant funds, i.e., will grant funds be placed in a separate bank account, will the grant funds be assigned a unique code(s) within the organization's overall accounting system, etc.

## **V-E Work Plan**

- (1) Provide a clear and concise plan for providing energy assistance to low-income households. The plan should include the following components at a minimum:
  - (a) Identify objectives and milestones for the proposed project.
  - (b) Indicate the type of utility or deliverable fuel services that are eligible for the project (e.g. electric, natural gas, propane, corn, wood pellets, etc.).
  - (c) Explain the services that will be provided through the energy assistance program and how the services enable low-income households to become or move toward becoming self-sufficient. Provide a detailed description of each component of the program.
  - (d) Describe how applications will be taken and low-income household eligibility will be determined and verified. Low-Income household verification must be consistent with state and federal law. Refer to the client/household eligibility verification requirements provided in Attachment D. Include the organization's household income eligibility limit in terms of percentage of poverty. If applicable, identify any cap on individual payments, how many times a household may receive energy assistance during a grant term, and any extenuating circumstances that are considered when processing applications.
  - (e) Estimate the number of energy assistance payments that will be made for eligible low-income households.
  - (f) Provide an estimated average payment per household.
  - (g) Provide the geographic area of the State that will be covered including the counties that will be served.
  - (h) Provide the names of the participating electric utilities that provide service within the proposed geographic area, the estimated number of households to be served within each provider's service territory, and the estimated dollar amount of grant funds that will be spent.
  - (i) Provide the names of the non-participating electric utilities that provide service within the proposed geographic area, the estimated number of households to be served within each provider's service territory and the estimated dollar amount of grant funds that will be spent.
  - (j) Provide the estimated number of households that use natural gas, propane, heating fuel and other heating sources within the proposed geographic area and the estimated dollar amount of grant funds that will be spent.
  - (k) Explain how payments will be made on behalf of the household. Identify the average application-to-payment time (i.e. how long it takes for payments to be processed after the application is started). Payments must be in the form of a

voucher or direct payment to the utility provider, cooperative, or distributor of deliverable fuel.

- (2) Explain how this plan will be coordinated with other services offered by the applicant.
- (3) Describe the outreach plan for promoting and disseminating energy related assistance program information to eligible low-income households, especially households with elderly individuals or disabled individuals, or both, and households with high home energy burdens.
- (4) Explain how the applicant coordinates with other agencies that provide weatherization and education focused on reducing energy consumption.
- (5) Provide information on programs currently administered by applicant that create opportunities for low-income customers to work toward self-sufficiency; include details on funding sources and matching dollars.
- (6) Provide a timeline for completing the planned activities and tasks for the proposed project during the grant period. Selected applicant(s) assumes the responsibility for ensuring the grant project is performed within the established timeline. A month-by-month format shall include at a minimum:
  - (a) The estimated number of households to be served.
  - (b) The estimated amount of funds to be spent for each household.
  - (c) The required dates for all reports due to the Issuing Office
- (7) Describe how the low-income energy assistance program will be evaluated. The program should be evaluated against the work plan developed above and the objectives, tasks, and requirements outlined throughout the RFP. The applicant should develop a clear and concise evaluation plan that will provide for an honest and objective assessment of the successes and failures of the project. The evaluation should have both quantitative and qualitative components.

#### **V-F Current and Prior Experience and Funding Disclosure**

Current and prior experience in administering energy assistance programs for low-income residents is important to the selection process. Proposals submitted should include:

- (1) A description of the organization's experience in conducting the type of work proposed. Include current activities and activities for the previous three (3) years. Include project results.
- (2) If applicant received a similar grant award from the State of Michigan in prior years for the type of project proposed, provide a summary of project accomplishments, including number of households served, noteworthy accomplishments, and problems encountered while carrying out grant responsibilities. Include a plan for addressing and resolving past problems.
- (3) Current funding source(s) and the level of funding for the current year and the previous three (3) years.

(4) Selected applicant(s) must provide a copy of the organization's most recent audited financial statement.

### **V-G Personnel**

Selected applicant(s) must be able to staff a project team that clearly possesses talent and experience in providing energy assistance to low-income households. In the narrative, identify the authorized contact person and key personnel to be involved with this project by name and title and provide a brief summary of their experience, qualifications, and the work to be performed.

Include a detailed organizational chart including names and titles of all individuals that will contribute to the project.

### **V-H Budget**

To enable the Issuing Office to evaluate all project costs, applicants shall submit a proposed budget and a corresponding separate budget narrative. The budget must follow the format outlined in Attachment G. Include only MPSC grant funds in the budget; do not include matching, leveraged, cost share or any other type of supplemental funds. The budget narrative must identify the budget line item and number, provide a detailed description for each line, and include individual unit prices.

Selected applicant(s) will be required to provide supporting documentation for all grant expenditures incurred during the term of the grant. Accounting records must be supported by source documentation including, but not limited to, general ledgers, time sheets, payroll registers, invoices, check copies and bank statements, or cancelled checks. Expenses will be verified based on actual expenditures incurred within the grant period that are supported by source documentation, not budgeted amounts.

(1) **Budget Changes** – Changes in the budget of less than 5% of the total line item amount do not require prior written approval, but selected applicant(s) must provide notice to the Grant Administrator. The allowable transfer should be calculated as less than 5% of the total line item that the funds are being transferred from.

Changes in the budget equal to or greater than 5% of the total line item amount will be allowed only upon prior review and written approval by the Grant Administrator and DLARA. A formal grant amendment must be signed by both the grantor and grantee.

(2) **Disallowed Costs** – disallowed costs include but are not limited to the following: sick pay, vacation pay, holiday pay, bonuses, overtime, tuition reimbursement/remission, vehicle allowance, seminars, conferences, meetings, subscriptions, dues and memberships.

(3) **Administrative Costs** – administrative costs cover expenses related to general administrative functions and coordination of functions and oversight related to MEAP administrative functions. Administrative costs should include costs of goods and services required for administrative functions of the program, travel costs incurred for official business in carrying out administrative activities or the overall management of the MEAP, costs of information systems related to administrative functions, and contractual services to sub-recipients or vendors that are solely for the performance of administrative functions. **Total**

**administrative and indirect costs included in the budget may not exceed 8% of the total grant award.**

(4) **Direct Program Costs** – direct program costs cover expenses directly related to the delivery of energy assistance under the Michigan Energy Assistance Program. Energy assistance means a program to assist eligible low-income households in meeting their home energy costs for the primary residence through payment or partial of bills for one or more of the following: electricity, natural gas, propane, heating oil, or any other deliverable fuel used to provide heat. Energy assistance must include services that will enable participants to become or move toward becoming self-sufficient, including assisting participants in paying their energy bills on time, assisting participants in budgeting for and contributing to their ability to provide for energy expenses, and assisting participants in utilizing energy services to optimize on energy efficiency. **Total direct program costs included in the budget must be at least 92% of the total grant award.**

(5) **Budget Requirements** – the proposed budget shall display three (3) headings identified as the: Line Item, Budget Category, and Total. The budget line items that need to be included, at a minimum, are listed below. The budget should reflect the best estimate of actual costs. Refer to the budget example provided in Attachment G.

(a) **Personnel**

(i) *Salary* – in the budget, include the name and job title for each staff position to be paid for by the grant. Time sheets and payroll registers must be submitted for each staff position, and hours worked must be grant related.

(ii) *Fringe Benefits* – fringe benefits may not exceed 33% ( $\frac{1}{3}$ ) of the employee's salary. Fringe benefits will be reimbursed based on actual expenditures up to 33%, not on budgeted amounts. Allowable benefits include: health, dental, and optical insurance, employer-paid Social Security and Medicare tax, Michigan and Federal unemployment tax, and other miscellaneous fringe benefits (life insurance, long- and short-term disability insurance, worker's compensation, and retirement program contributions up to 4%). Applicants must provide details on the organization's method of calculating fringe benefit expenses that will be charged to the grant including whether fringe benefits are calculated on an annualized basis or based on the length of the grant term. Refer to the fringe benefit load factor calculation example in Attachment H.

The budget narrative must include the number of hours per week a full time employee of the organization is expected to work, a description of the work to be performed by each individual; the estimated hours to be worked; actual pay rate; the fringe benefit percentage being charged to the grant for each employee; the percentage of the employee's time allocated to the grant; whether each employee is salaried-exempt, salaried-non-exempt or hourly; and any other applicable information related to the individual's duties and responsibilities in connection with this grant.

Independent contractors (i.e. individuals receiving a Form 1099) and temporary workers should be placed under the **Contractual Services** budget category. **Only employees on the selected applicant's payroll should be included in the Personnel budget category.**

(b) **Supplies, Materials, & Equipment** – specify item(s) and cost. The budget narrative should include the anticipated cost of each item, a detailed explanation of the item’s purpose, and how it relates to the project being funded. Be as detailed as possible.

(c) **Contractual Services** – must be competitively bid. Individuals that are independent contractors (Form 1099) and temporary workers that are not on the selected applicant’s payroll must be placed under **Contractual Services**. When competitive selection is not feasible or practical, the selected applicant(s) agrees to obtain the written approval of the Grant Administrator before making a sole source selection. Selected applicant(s) must provide a copy of contracts, memoranda of understanding or agreements signed by selected applicant(s) and contractor(s).

Selected applicant(s) assumes responsibility to select subcontractors on a competitive basis. A minimum of three (3) bids must be solicited and proposals must include, at a minimum: (1) name of selected applicant(s), grant number, and grant period; and (2) the type, number, and description of projects as described in the proposal.

Selected applicant(s) must provide the Grant Administrator with the solicitation, list of vendor responses (including amounts), and name of the selected vendor. Selected applicant(s) must maintain bids on file at their place of business according to Section II-B, Record Retention. The Grant Administrator will reserve the right to request a copy of all bids for services that are competitively bid.

Selected applicant(s) must award the project to the lowest bid unless the Grant Administrator has given prior written approval for selection of a higher bid. Selected applicant(s) must provide a written justification for the selection of a higher bid. When awarding subcontracts, the selected applicant(s) shall ensure that preference is given to products manufactured in or services offered by Michigan-based firms.

(d) **Travel** – in the budget include the name and job title for each staff position that will be traveling. Selected applicant(s) must follow the State of Michigan Standardized Travel Regulations ([http://www.michigan.gov/dtmb/0,5552,7-150-9141\\_13132---,00.html](http://www.michigan.gov/dtmb/0,5552,7-150-9141_13132---,00.html)).

The State will reimburse for mileage, lodging, and meals. Refer to Attachment I for current State travel rates. Meals and lodging must be supported by itemized, legible receipts and reasons for travel. Itemized meals receipts must include a list of each item purchased; receipts for payments made by credit card that are not itemized will not be accepted. Mileage **must** be supported by travel log(s) with beginning and ending addresses, mileage total, and reason for travel. Refer to the travel log example provided in Attachment J. Out-of-state travel must be directly related to the grant project and approved by the Grant Administrator prior to travel. Travel expenses listed in the travel budget category are strictly for individuals listed on the budget under Personnel. Per diem payments and alcoholic beverage reimbursements are not allowed.

(e) **Other Expenses** – this category is solely for use by organizations charging a per-case fee for work performed by subunits or internal agencies within the organization that do not require a competitive bid, i.e. contract, memorandum of understanding or any other type of signed agreement.

(f) **Energy Assistance Program Costs** – at a minimum indicate the approximate number of households to be assisted and the estimated average payment. The budget category is solely for costs incurred for delivery of energy assistance program services as set forth in Section V-H(4).

(g) **Indirect Costs** – indirect costs are costs not directly or specifically related to the grant program. Indirect costs are costs of administering the organization and must be spread over a number of products, services, or grant programs proportionately. Examples include office supplies and equipment, utilities, rent, maintenance and repair, insurance, accounting and bookkeeping services, and legal services. Non-cash expenses like depreciation, amortization, and depletion are not allowable indirect costs under this grant.

Selected applicant(s) will be reimbursed for its proportional share of indirect costs. This means the MPSC should be allocated a portion of the selected applicant's indirect costs and **not** 100% of the organization's total indirect cost.

Indirect costs should be displayed on the face of the budget on a single line item and the indirect rate should be rounded to six (6) decimal places. The budget narrative should contain a list of indirect costs, how the selected applicant(s) determined its indirect costs, and the percentage rate calculation for reimbursable indirect costs. Selected applicant(s) are not required to provide documentation supporting indirect costs, however documentation verifying the costs must be retained by the selected applicant(s).

(6) To ensure efficient review and approval of grant expenditures, selected applicant(s) will be provided additional guidelines to assist with calculating and determining accurate and appropriate grant expenditures.

(7) Each budget category should have a subtotal displaying the total anticipated amount to be expended, and the budget should include a subtotal for total direct project costs and a sum of total project costs.

(8) After grants are awarded by the MPSC, modifications of proposals and budgets may be necessary. If the MPSC does not award the total amount requested in the original proposal, selected applicant(s) will be required to submit a revised proposal, budget and budget narrative for the purpose of entering into a Grant Agreement. New line items to the revised budget are not allowed.

(9) Selected applicant(s) assumes the responsibility of ensuring all unexpended grant funds are returned to the State of Michigan at the end of the grant period. Failure to do so may render selected applicant(s) ineligible for future grant awards and/or subject to legal action.

(10) Selected applicant(s) may not commingle grant award funds with current or future grant awards. All funding sources must be managed and accounted for separately.

(11) If a utility provider, cooperative or distributor of deliverable fuel refunds an energy assistance payment to a selected applicant or an agency working on its behalf during the grant term, the refund may be used to serve additional eligible households during the grant term. However, if a utility provider, cooperative or distributor of deliverable fuel refunds an energy assistance payment to a selected applicant or an agency working on its behalf after the grant term has ended, the refund must be returned to the State of Michigan. Monies refunded after the grant

term has ended cannot be used to provide services to additional eligible households. Any and all refunds received after the end date of the grant term must be returned to the State of Michigan.

**V-I Additional Information and Comments**

Include in this section any other information that is believed to be pertinent but not specifically requested elsewhere in this RFP.

**V-J Certification of Proposal**

Please sign the proposal and include the following language:

I certify that all information contained in the proposal is true to the best of my knowledge and belief, and that the organization is in compliance and agreement with all sections of the Request for Proposal.

Certified by: \_\_\_\_\_  
Authorized Signatory and Title  
Name of Organization

## PART VI: SELECTION CRITERIA

All proposals received shall be subject to an evaluation by the Issuing Office. The evaluation will be conducted to select an organization(s) to perform the proposed grant project within the established timeline.

All proposals will receive an initial screening to ensure that the eligibility criteria are met. Proposals failing to meet the eligibility requirements described in Section I-B will be rejected automatically. Proposals meeting the eligibility requirements will be evaluated according to the selection criteria below

Total points equal 100.

### **1. General (5 points)**

- (a) Does applicant follow the format identified in Part V: Information Required from Applicant? (2.5 points)
- (b) Does applicant provide a response to each section contained in Part V: Information Required from Applicant? (2.5 points)

### **2. Experience and financial stability of organization (15 points):**

- (a) Does the applicant have an existing structure for providing energy assistance to low-income households that can handle additional distribution activities? (5 points)
- (b) Does the organization have a proven record in distributing energy assistance to low-income households? (5 points)
- (c) Does the applicant appear to be financially stable based on information provided in response to Sections V-D: Management Summary and V-F: Current and Prior Experience and Funding Disclosure? (5 points)

### **3. Management summary (10 points):**

- (a) Does applicant identify a Project Manager? (2.5 points)
- (b) Does applicant identify an individual responsible for financial management and reporting? (2.5 points)
- (c) Does the applicant provide a summary of how the proposed project will be monitored to ensure funds are used for the intended purpose, project milestones and timelines are met, and quality assurance standards are followed? (5 points)

### **4. Work plan (55 points):**

- (a) Is the Work Plan detailed, concise, and compatible with the objectives and tasks outlined in the RFP and inclusive of the following. Points will be awarded based on the inclusion and overall effectiveness of each component.

- (i) Applicant's guidelines and procedures for determining and verifying household eligibility. (5 points)
- (ii) Applicant's specific role in providing energy assistance to low-income households, to ensure that the MEAP, as a whole, results in statewide coverage for electricity, natural gas, propane, heating oil, and any other deliverable fuels used to provide heat. (10 points)
- (iii) Applicant's plan to enable participants to become or move toward becoming self-sufficient, including any plans to coordinate efforts with other existing public or private efforts to assist low-income households in becoming or moving toward becoming self-sufficient. (10 points)
- (iv) Applicant's plan to reduce shut-offs by shifting the emphasis of energy assistance towards prevention and accountability and away from emergency crisis relief. (10 points)
- (v) Applicant's plan to promote the discovery of innovative, cost-efficient, evidence-based methods for providing energy assistance to low-income households in Michigan. (10 points)
- (vi) Applicant's plan to distribute energy assistance in a convenient, customer-friendly manner. (5 points)
- (vii) Applicant's plan to collect metrics to measure the success of the program in meeting the goals of the MEAP program, including (1) reduction in energy consumption per household, (2) reducing in the rate of shut-offs, (3) reduction in the size of the energy subsidy per household, and (4) increase in timely bill payments. (5 points)

**5. Budget (15 points):**

- (a) Does applicant provide a budget that includes reasonable and detailed budget line items as requested? (2.5 points)
- (b) Does applicant provide a budget narrative that includes reasonable and detailed explanations for the corresponding budget lines? (2.5 points)
- (c) Do energy assistance program costs total at least 92% of the total grant award? (10 points)

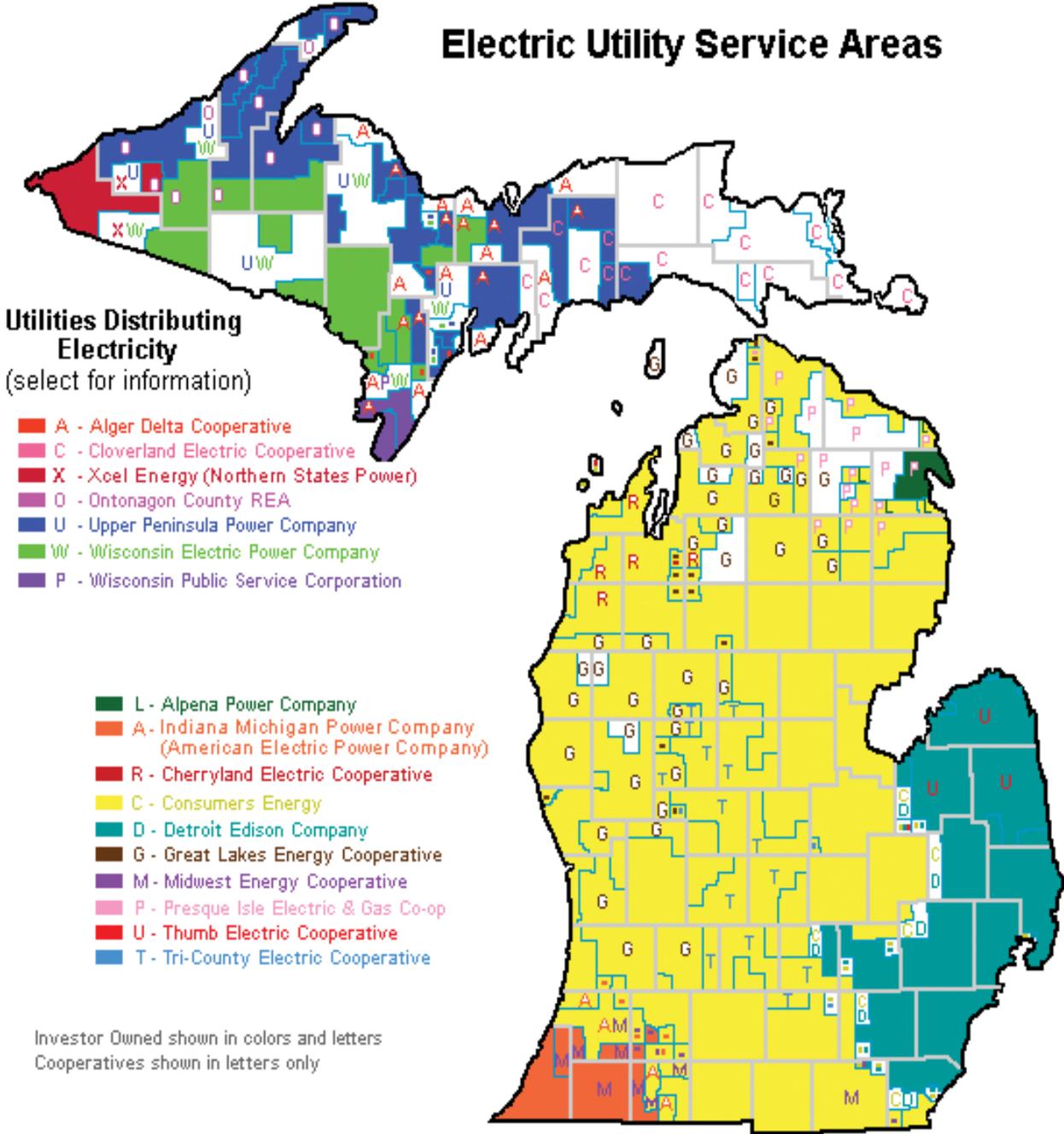
# **Attachment A**

<b>Participating Electric Service Provider</b>	<b>Estimated \$ Amount of LIEA Funds to be Collected</b>
Alger-Delta Cooperative Electric Association	\$97,961.17
Baraga, Village of	\$9,182.01
Bay City, City of	\$237,833.01
Chelsea Department of Electric and Water	\$32,716.83
Cherryland Electric Cooperative	\$354,974.64
Clinton, Village of	\$16,293.34
Consumers Energy Company	\$21,084,558.75
DTE Electric Co. f/k/a Detroit Edison Company	\$25,224,994.76
Hillsdale Board of Public Utilities	\$74,627.50
Indiana Michigan Power Company	\$1,507,802.11
Lowell Light and Power	\$31,356.09
Marshall Electric Department	\$55,186.72
Midwest Energy Cooperative	\$384,555.86
Negaunee Department of Public Works	\$26,623.10
Newberry Water and Light Board	\$16,600.98
Niles Utility Department	\$78,118.09
Northern States Power Company-Wisconsin	\$106,811.87
Norway, City of	\$25,061.21
Petoskey, City of	\$61,753.75
Presque Isle Electric and Gas Co-op	\$390,685.09
St. Louis, City of	\$22,860.37
Thumb Electric Cooperative	\$144,687.66
Union City Electric Department	\$14,755.11

<b>Non-Participating Electric Service Providers</b>
Alpena Power Company
Bayfield Electric Cooperative
Charlevoix, City of
Cloverland Electric Cooperative
Coldwater Board of Public Utilities
Croswell Municipal Light & Power Department
Crystal Falls, City of
Daggett Electric Department
Detroit Public Lighting Department
Dowagiac, City of
Eaton Rapids, City of
Escanaba, City of
Gladstone, City of
Grand Haven Board of Light and Power
Great Lakes Energy Cooperative
Harbor Springs, City of
Hart Hydro, City of
Holland Board of Public Works
HomeWorks Tri-County Electric Cooperative
L'Anse, Village of
Lansing Board of Water & Light
Marquette Board of Light and Power
Ontonagon Co. Rural Electrification Association
Paw Paw, City of
Portland, City of
Sebewaing, City of
South Haven, City of
Stephenson, City of
Sturgis, City of
Traverse City Light & Power
Upper Peninsula Power Company
Wakefield, City of
Wisconsin Public Service Corporation
Wisconsin-Electric Power Company d/b/a/ We Energies
Wyandotte Department of Municipal Service
Zeeland Board of Public Works

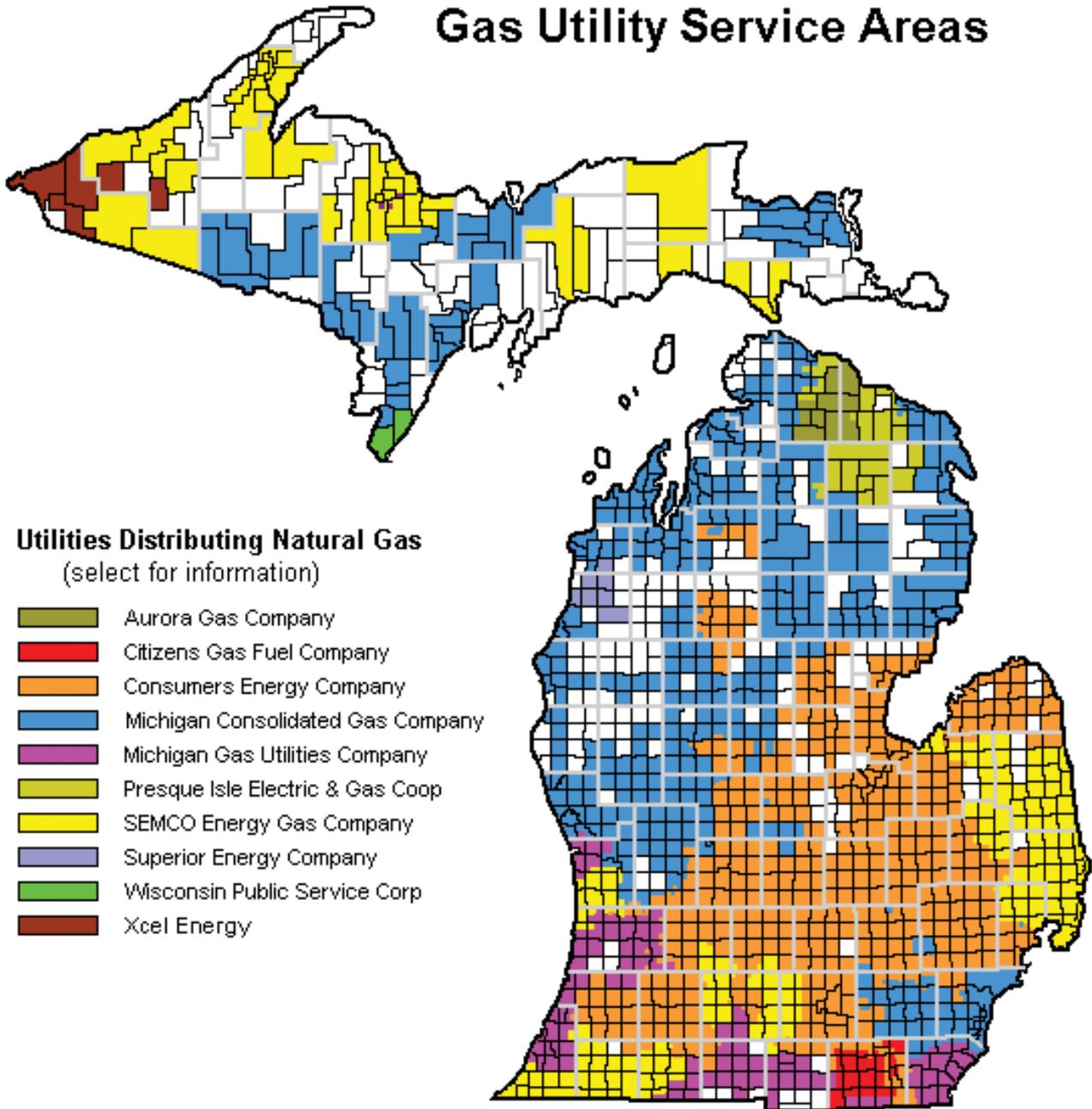
# **Attachment B**

# Electric Utility Service Areas



# **Attachment C**

# Gas Utility Service Areas



# **Attachment D**

## Client/Household Eligibility Verification Requirements

Agencies (grantees) **MUST** keep copies of documents used to verify identity, residency, and income. The following is a list of the minimum information each agency (grantee) must collect, verify, copy, and retain.

**It is anticipated that eligible low-income households will work with a single energy assistance provider throughout the entire heating season. Any payment made on behalf of an energy customer must resolve the crisis/emergency for at least 30 days.**

### Agency (grantee) Information

1. Date of verification
2. Name of agency (grantee) representative
3. Agency (grantee) representative signature and date

### Applicant Information

1. Full Name
2. Social Security Number<sup>1</sup>
3. Address
4. City and Zip Code
5. County
6. Birth date

### Applicant Questionnaire

1. Household residents:
  - a. # Children (<=2)
  - b. # Children (3, 4 or 5)
  - c. # Adults (18–59)
  - d. # Seniors (>=60)
2. Total Household income:

Total household income is the summation of the income of each member of the household; income must be verified using third party documentation, which may include, but is not limited to: Wages (W-2); Federal tax forms (1040, 1040EZ, etc.); Michigan state tax forms (MI-1040, etc.); unemployment statements/letters; social security statements/letters; pension statements/letters; workman’s compensation statements/letters; alimony or spousal support statements/letters; disability statements/letters; interest, annuities, or dividends statements/letters.
3. Is the household’s income at or below the applicable level (e.g. 150% of current federal poverty level guidelines)?
4. Was the household prescreened by DHS? If yes, retain a copy of the DHS decision letter. If not, the selected applicant(s) will be responsible for determining eligibility.

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<sup>1</sup> If social security numbers are not used as a way to document and verify identity, agencies (grantees) must provide written documentation to the State detailing the alternative method for verifying identity. When providing social security numbers to the MPSC only provide the last four digits.

5. Has the household received energy assistance services from the agency (grantee) in the past?  
If yes, document information for the prior services, including the date, assist amount (if applicable), utility (if applicable), and agency.
6. Has the household received energy assistance from any agency in last 12 months?  
If yes, document information for the prior services, including the date, assist amount (if applicable), utility (if applicable), and agency.
7. Reasons for assistance, which may include, but are not limited to:
  - a. Low-income household
  - b. Job loss
  - c. Medical hardship
  - d. Other (needs explanation)
8. Document the utility name, account number, and amount to be paid for EACH PAYMENT.  
**Energy assistance payments must be made directly to the utility or deliverable fuel provider.**
9. Client/household signature and date.

When energy assistance payments are made for deliverable fuels, agencies (grantees) must keep record of the metered delivery notification that documents the amount of deliverable fuel provided. This documentation should also include the amount of the deliverable fuel already on hand to show need.

# **Attachment E**



# **Attachment F**

C-108 (7/97)

Distribution:

White -- Contract & Grant Admir

Canary -- Bureau

Pink -- Contractor/Grantee

## FINANCIAL STATUS REPORT AND/OR PAYMENT REQUEST

Authorized by P.A. 380 of 1965, as amended, and appropriations approved by the Legislature. Completion is required for payment

1. Name and Address of Vendor Organization		2. Agency (Bureau, Commission or Authority)			3. Grant or Contract Number			
Grantee Organization Name 1234 Any Street Any City, MI 12345		Michigan Public Service Commission			PSC-14-01			
		4. Federal I.D. Number or Social Security Number			5. Final Report		6. FSR/Payment Request	
		12-3456789			___ YES <u>X</u> NO		#1	
		7. Project Title:			8. Duration of Contract/Grant		9. Current Report Period	
		Low-Income Energy Assistance Grant			From: 11/27/2013 To: 08/31/2014		From: 11/27/2013 To: 1/31/2014	
10. Cost Categories (salary, fringes, equipment, etc.)	Personnel	Supplies, Materials & Equipment	Contractual Services	Travel	Other Expenses	Direct Assistance	Indirect Cost	Total
a. Expenditures Previously Reported	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
b. Expenditures this Report Period	1,500.69	125.18	0.00	235.69	0.00	125,637.73	0.00	127,499.29
c. Expenditures to Date (line a plus line b)	1,500.69	125.18	0.00	235.69	0.00	125,637.73	0.00	127,499.29
d. Non-State Expenditures to Date	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
e. State Share of Expenditures (line c minus line d)	1,500.69	125.18	0.00	235.69	0.00	125,637.73	0.00	127,499.29
f. Total State Funds Authorized	65,000.00	500.00	0.00	1,200.00	0.00	897,899.00	35,401.00	1,000,000.00
g. Unexpended Balance of State Funds	63,499.31	374.82	0.00	964.31	0.00	772,261.27	35,401.00	872,500.71
11. Request for Reimbursement or Advance	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
h. State Share of Expenditures to Date (from line e above)								127,499.29
i. Total Amount of State Advances Previously Received								500,000.00
j. Advance Balance (line i minus line h)								372,500.71
k. Request Advance								0.00
l. Request Reimbursement (if applicable, line h minus line i)								0.00
12. Licensing and Regulatory Affairs Use Only — Holdback _____ % = \$ _____							Adjusted Payment	
13. Remarks		14. Certification: I certify that to the best of my knowledge and belief this report is correct and complete and that all expenditures are for the purposes set forth in the grant award/contract documents.			15. Agency Approval			
					Signature		Date	

# **Attachment G**

**BUDGET**  
Selected Applicant Name

Line Item	Budget Category	TOTAL
1	<b>PERSONNEL</b>	
2	<i>Salary</i>	
3	Employee Name (Job Title)	0
4		<i>Total Salary</i> 0
5	<i>Fringe Benefits</i>	
6	Employee Name (Job Title)	0
7		<i>Total Fringe Benefits</i> 0
8		<b>Total Personnel</b> 0
9	<b>SUPPLIES, MATERIALS AND EQUIPMENT</b>	
10		0
11		<b>Total Supplies, Materials and Equipment</b> 0
12	<b>CONTRACTUAL SERVICES</b>	
13		0
14		<b>Total Contractual Services</b> 0
15	<b>TRAVEL</b>	
16	Employee Name – Mileage, Meals and Lodging	0
17		<b>Total Travel</b> 0
18	<b>OTHER EXPENSES</b>	
19		0
20		<b>Total Other Expenses</b> 0
21	<b>ENERGY ASSISTANCE PROGRAM EXPENSES (categorize as much as possible)</b>	
22	Payments to Energy Providers	0
23		<b>Total Energy Assistance Program Expenses</b> 0
24	Total Direct Cost	0
25	Indirect Cost (MPSC Rate: 0.0000)	0
26	Total Project Cost	<b>0</b>

# **Attachment H**

## Employee Load Factors

Employee:	Jane Doe
Yearly Salary:	37,502.40
Budget Salary:	24,570.00
Budget Fringe:	7,755.00
Budget Fringe Rate:	31.56%

Yearly Cost			% of Salary
<b>BASIC BENEFITS</b>			
Health	2,904.96	0.07746100	
Dental	-	0.00000000	
Vision	361.70	0.00964500	
Additional Benefits	-	0.00000000	
Pension	1,125.07	0.03000000	
<b>PAYROLL TAXES</b>			
Social Security	2,325.15	0.06200000	
Medicare	543.78	0.01450000	
Worker's Compensation	180.01	0.00480000	
Unemployment	1,235.00	0.03293100	
Loaded Hard Dollars	8,675.68	0.23133658	
Actual Fringe Rate	Loading Factor:	23.133658%	
<b>Employee Breakdown</b>			
	SALARY	FRINGE	
<b>Annual</b>	37,502.40	8,675.68	
<b>Monthly</b>	3,125.20	722.97	
<b>Bi-monthly</b>	1,562.60	361.49	
<b>Bi-weekly</b>	1,442.40	333.68	
<b>Weekly</b>	721.20	166.84	
<b>Daily</b>	144.24	33.37	
<b>Hourly</b>	18.03	4.17	

# **Attachment I**

<b>DEPARTMENT OF TECHNOLOGY, MANAGEMENT &amp; BUDGET,  VEHICLE AND TRAVEL SERVICES (VTS)  SCHEDULE OF TRAVEL RATES FOR CLASSIFIED and UNCLASSIFIED EMPLOYEES  EFFECTIVE January 1, 2013</b>
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**MICHIGAN SELECT CITIES \***

Meals and Lodging	
Lodging**	\$75.00
Breakfast	8.75
Lunch	8.75
Dinner	21.00

**IN-STATE ALL OTHER**

Meals and Lodging	
Lodging **	\$75.00
Breakfast	7.25
Lunch	7.25
Dinner	16.50

Per Diem

Total Per Diem	\$76.50
Lodging	45.50
Breakfast	7.25
Lunch	7.25
Dinner	16.50

Group Meetings

Group Lunch	10.25
-------------	-------

**OUT-OF-STATE SELECT CITIES \***

Meals and Lodging	
Lodging **	Contact Conlin Travel
Breakfast	11.00
Lunch	11.00
Dinner	22.00

**OUT-OF-STATE ALL OTHER**

Meals and Lodging	
Lodging **	Contact Conlin Travel
Breakfast	8.75
Lunch	8.75
Dinner	20.50

**MILEAGE RATES**

Standard Rate (State's Mid-Sized Car Cost)	\$.390 per mile
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\* See select cities listing.

\*\* Lodging available nightly at State rate, or call Conlin Travel at 877-654-2179

**SELECT HIGH COST CITY LIST**  
**TRAVEL RATE REIMBURSEMENT FOR CLASSIFIED and UNCLASSIFIED EMPLOYEES**  
**EFFECTIVE October 1, 2012**

<b><u>MICHIGAN SELECT CITIES AND COUNTIES</u></b>			
<b>CITIES</b>		<b>COUNTIES</b>	
Ann Arbor, Detroit, Holland, Mackinac Island, Pontiac, Auburn Hills, South Haven		All of Wayne All of Oakland	
<b><u>OUT-OF-STATE SELECT CITIES</u></b>			
<b>STATE</b>	<b>SELECT CITY OR COUNTY AS DEFINED</b>	<b>STATE</b>	<b>SELECT CITY OR COUNTY AS DEFINED</b>
<b>ARIZONA</b>	Phoenix / Scottsdale	<b>MINNESOTA</b>	Minneapolis / St. Paul Hennepin & Ramsey County
<b>CALIFORNIA</b>	Los Angeles (Los Angeles, Orange & Ventura Counties, and Edwards AFB) / Monterey / Palm Springs / San Diego / San Francisco / Santa Monica South Lake Tahoe / Truckee / Yosemite National Park	<b>NEVADA</b>	Las Vegas
<b>COLORADO</b>	Aspen / Telluride / Vail	<b>NEW MEXICO</b>	Santa Fe
<b>CONNECTICUT</b>	Bridgeport / Danbury	<b>NEW YORK</b>	Manhattan (the borough of Manhattan, Brooklyn, Queens, Staten Island) Riverhead / Ronkonkoma Melville / Smithtown / Tarrytown White Plains / New Rochelle
<b>DISTRICT OF COLUMBIA</b>	Washington DC (also the cities of Alexandria, Falls Church, Fairfax & Counties of Arlington, Fairfax in Virginia and the Counties of Montgomery and Prince George in Maryland. (See also Maryland & Virginia) Boca Raton / Delray Beach / Jupiter / Fort Lauderdale / Key West	<b>PENNSYLVANIA</b>	Bucks County / Philadelphia
<b>FLORIDA</b>		<b>RHODE ISLAND</b>	Bristol / Jamestown / Middletown Newport (Newport County) Providence
<b>IDAHO</b>	Sun Valley / Ketchum	<b>TEXAS</b>	Austin / Dallas / Houston L.B. Johnson Space Center
<b>ILLINOIS</b>	Chicago (Cook and Lake Counties)	<b>UTAH</b>	Park City (Summit County)
<b>LOUISIANA</b>	New Orleans	<b>VERMONT</b>	Manchester / Stowe (Lamoille County)
<b>MARYLAND</b>	See District of Columbia / Counties of Montgomery and Prince Georges Baltimore City / Ocean City	<b>VIRGINIA</b>	See District of Columbia Alexandria / Falls Church Fairfax
<b>MASSACHUSETTS</b>	Boston (Suffolk)/Cambridge/ Burlington / Woburn / Martha's Vineyard	<b>WASHINGTON</b>	Seattle

# **Attachment J**

**TRAVEL LOG**

Grant No. PSC- \_\_\_\_\_

Period: \_\_\_\_\_

Employee: \_\_\_\_\_

Date	Odometer Reading		Daily Total	Personal Miles	Starting Location (complete address)	Destination (complete address)	Miles x .390 =			Reason for Travel
	Start/End						Reimbursement			
<b>Total:</b>										

Employee  
Signature: \_\_\_\_\_

Date: \_\_\_\_\_